

THE ULTIMATE[!] GUIDE TO CONTACT CENTER OPTIMIZATION

How to improve satisfaction and reduce costs with customer journeys



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Introduction

Poor customer service is costing businesses more than \$75 billion a year, according to [Forbes](#). The pressure to reduce contact center costs is immense. But many contact center leaders struggle to achieve these outcomes while simultaneously improving customer satisfaction.

Contact centers are now considered more than just service centers. Across industries, enterprises expect contact center leaders to transform them into customer experience hubs — delivering the exceptional experiences customers demand and drive long-term growth.

Advances in digital technology have reshaped customer expectations for exceptional experiences. Today, customers want choices in how they engage with service and care centers. No matter how your customers choose to interact with your organization, contact center leaders must ensure all agents can meet customers where they are, understand each individual's unique context and enable them to reach their goals.

In this ebook, we'll explore why enterprise contact centers struggle to increase satisfaction while mitigating costs. We'll also demonstrate how aligning on customer journeys can help contact center leaders overcome these challenges.

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TOP CHALLENGES FACING CONTACT CENTER LEADERS

Omnichannel interaction data is siloed or nonexistent

The COVID-19 pandemic forced customers and enterprises to rely on digital channels more than ever before. Digital transformation has long been a goal for contact center leaders, but its importance grew immensely over the past few years.

A recent [CCW Digital market study](#) found that contact center leaders are raising digital experience priorities to respond to this shift. Initiatives include “training staff for interactions in new channels, optimizing AI and self-service opportunities and improving integrations between touchpoints.”

While these priorities are sound, contact center leaders are challenged to put them in motion. Current systems and workforce constraints often limit your ability to understand customers as they move across channels.

The problem doesn't improve once you get beyond the contact center where data is typically isolated within siloed systems. While managers of chat, IVR, voice and other platforms may strive to share insights, accessing the data in their systems is cumbersome and rarely happens in real time.

The amount of effort, resources and cost necessary to achieve a comprehensive and effective omnichannel strategy is staggering. Those who try to tackle this problem often find their efforts suffer due to lack of focus, competing priorities and significant costs.



McKinsey
& Company

Companies that can aggregate all customer information — including user attributes, behaviors and past interactions across all channels — will be able to engage much more effectively.

Failure to recognize context puts CX at risk

More than half of customers engage with three to five channels during each journey they take. They might require agent assistance if they encounter a problem trying to diagnose a service interruption or dispute a credit card charge.

Your customers expect agents to understand their unique context, including:

- Why they've contacted your organization
- The goal they are trying to achieve
- The steps they've taken prior to contacting an agent

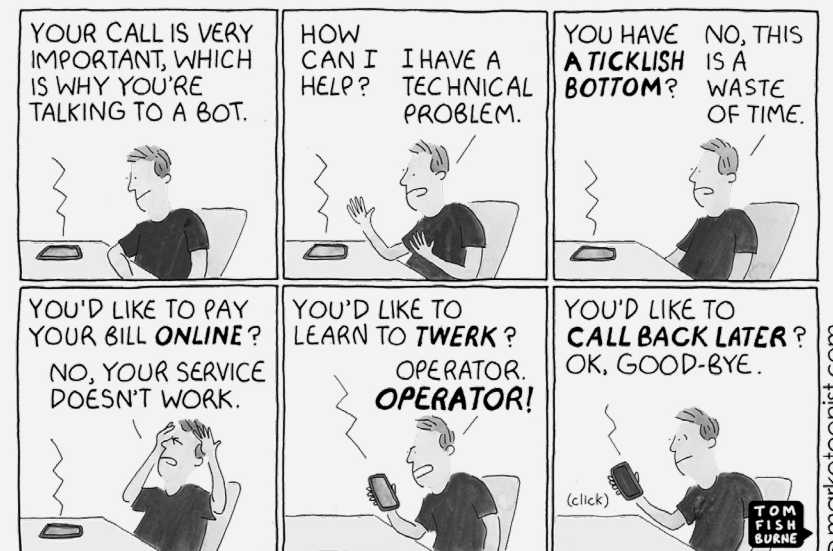
Armed with this knowledge, agents can serve customers more efficiently. This will have a positive impact on metrics, increasing Net Promoter Score (NPS), customer satisfaction (CSAT) and FCR, while minimizing customer effort (CES), average handle time (AHT) and repeat calls.

Without it, you risk frustrating them with interactions that require lots of effort, long hold times and costly escalations. Compound enough poor-quality interactions together and you could put customers at risk for churn.

87%

of customers find it frustrating to repeat themselves in multiple channels; 73% question doing business again with that brand as a result

[How Covid has changed the channels of engagement](#), CMO Council, 2020



Natural language understanding is insufficient without context

Contact centers apply speech and text analytics tools to analyze interactions through their IVR, chat and call systems. Analysts rely on this technology to comb through interaction recordings to create transcripts, identify common call drivers, flag potential compliance issues and more.

Leaders often rely on natural language processing (NLP) to better identify customer intent and improve call dispositioning. This technology can help agents understand why customers have reached out — but not what steps they've taken, or which channels they leveraged before reaching out for help.

However, these analytics solutions typically are restricted to contact center-specific channels. The rapid analysis and high accuracy of NLP is beneficial but cannot provide the context of what customers were doing before and after they speak with an agent.

It's essential to know what customers are doing in other channels and which goal they're trying to reach. Otherwise, it's incredibly difficult to deliver intuitive and empathetic experiences that are also efficient and scalable.



Leaders must evolve measurement strategies

To resolve issues more effectively and efficiently, it's crucial to know the goal each customer is seeking to achieve and the impact of their unique sequence of interactions on CX metrics and business objectives. Unfortunately, many contact center leaders struggle to do so.

Most contact center leaders use dashboards to track performance metrics like FCR, AHT and CSAT. However, these KPIs typically are measured in aggregate or by channel, rather than by the actual goals your customers are pursuing. This is problematic, as top-level metrics make it difficult to:

- Ensure experiences are consistent across all service channels
- Quantify the impact individual customers have on each contact center metric
- Connect contact center metrics to business outcomes like revenue, customer lifetime value, retention and cost to serve

Measurement programs must evolve from overall satisfaction, efficiency and containment rates to monitoring specific signals and indicators that are aligned with both contact center and organization-wide outcomes. Your dashboards should allow you to drill down from high-level KPIs to the specific paths customers take to reach their goals. This will show the specific channels or interactions within a journey that cause your scores to fluctuate.



41%

of companies say they capture improvements in metrics like NPS or satisfaction, but are challenged to translate them into revenue or costs

The state of customer journey management and CX measurement, Pointillist, 2021

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WHY CUSTOMER JOURNEYS ARE THE KEY TO CONTACT CENTER OPTIMIZATION

Journeys reveal actionable information for agents and leaders

Interactions within your contact center are just one part of a customer journey. It's crucial to understand end-to-end journeys to identify the drivers of contact center outcomes.

A customer journey encompasses the series of steps customers take with your organization — within and beyond the contact center — to achieve a goal. To measure and improve contact center experiences and operations, you need to connect the dots. Customers view what they do before and after they engage with the contact center as one experience with your organization.

This way, you can easily answer questions such as:

- When do your customers use self-service channels?
- Why do they switch to agent-assisted channels?
- Which journeys are driving up costs the most?
- Which behaviors affect key metrics? How?

Journeys can also enhance approaches you already use, like text and speech analytics. Combining what customers are doing with why they're doing it gives agents the actionable information they need to deliver consistent, high-quality service across every channel.



“Without being thoroughly customer-centric and focused on customer journeys, companies are likely to expend their resources in the wrong places and inevitably fall behind the competition.”

Redefine the omnichannel approach:

Focus on what truly matters.

McKinsey & Company, 2020

McKinsey
& Company

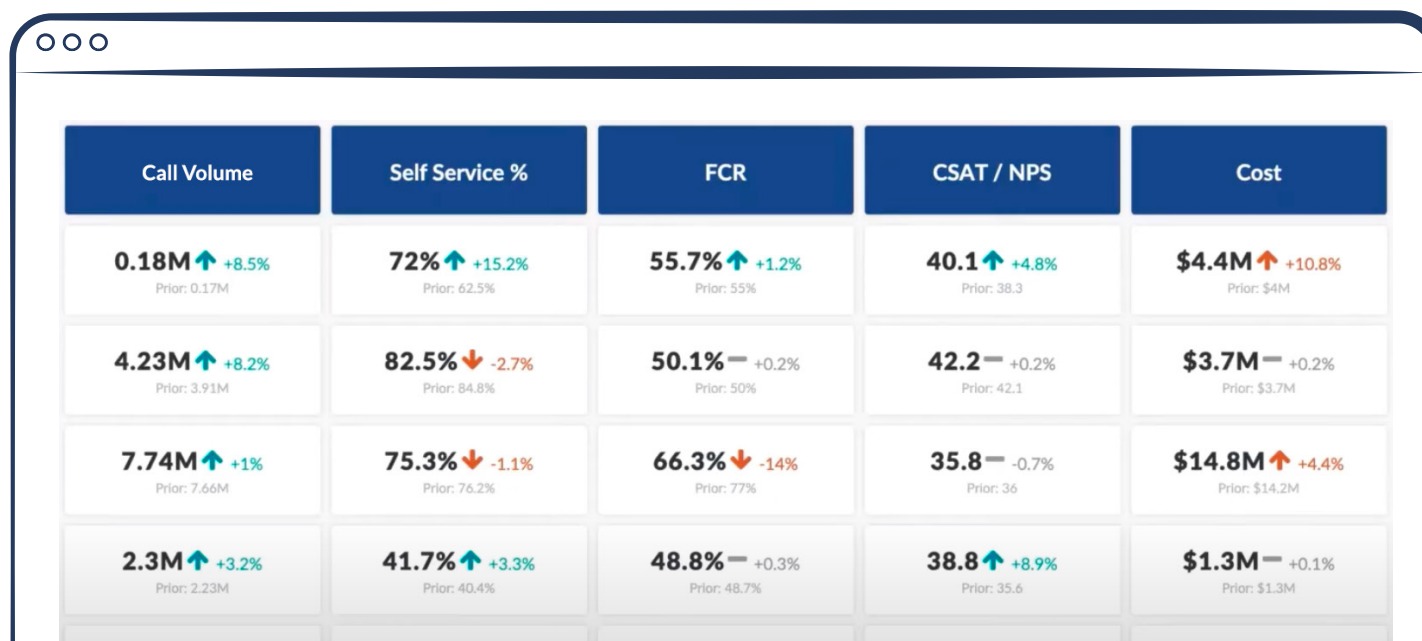
Improve metrics with customer journeys

Monitoring what happens before, during and after a contact center interaction gives you the information you need to prioritize CX improvements and cost saving initiatives. Rather than simply monitoring their KPIs by channel, customer-centric leaders track them by journey. This includes what happens before their customers reach the contact center and what happens after an agent addresses their inquiry.

For example, one national telecom provider had a goal to decrease call duration. Agents worked hard to shorten calls and significantly reduced this metric. However, changes in the contact center led more customers to request a technician to complete the setup for their new modem. As a result, truck roll costs rose dramatically, heavily impacting the overall cost to serve.

Once the company analyzed the entire Setup journey, they realized the majority of customers visited the FAQ page to self-serve, but switched to agent-assisted channels to complete the process.

By taking a journey-based approach, the wireless provider improved the FAQ page. It also enhanced agent training to provide sufficient instructions to customers who opted to call the contact center. This resulted in reduced call volume and fewer truck rolls, which decreased costs and improved satisfaction.



Call Volume	Self Service %	FCR	CSAT / NPS	Cost
0.18M +8.5% <small>Prior: 0.17M</small>	72% +15.2% <small>Prior: 62.5%</small>	55.7% +1.2% <small>Prior: 55%</small>	40.1 +4.8% <small>Prior: 38.3</small>	\$4.4M +10.8% <small>Prior: \$4M</small>
4.23M +8.2% <small>Prior: 3.91M</small>	82.5% -2.7% <small>Prior: 84.8%</small>	50.1% +0.2% <small>Prior: 50%</small>	42.2 +0.2% <small>Prior: 42.1</small>	\$3.7M +0.2% <small>Prior: \$3.7M</small>
7.74M +1% <small>Prior: 7.66M</small>	75.3% -1.1% <small>Prior: 76.2%</small>	66.3% -14% <small>Prior: 77%</small>	35.8 -0.7% <small>Prior: 36</small>	\$14.8M +4.4% <small>Prior: \$14.2M</small>
2.3M +3.2% <small>Prior: 2.23M</small>	41.7% +3.3% <small>Prior: 40.4%</small>	48.8% +0.3% <small>Prior: 48.7%</small>	38.8 +8.9% <small>Prior: 35.6</small>	\$1.3M +0.1% <small>Prior: \$1.3M</small>

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SIX WAYS JOURNEYS CAN IMPROVE SATISFACTION AND REDUCE COSTS



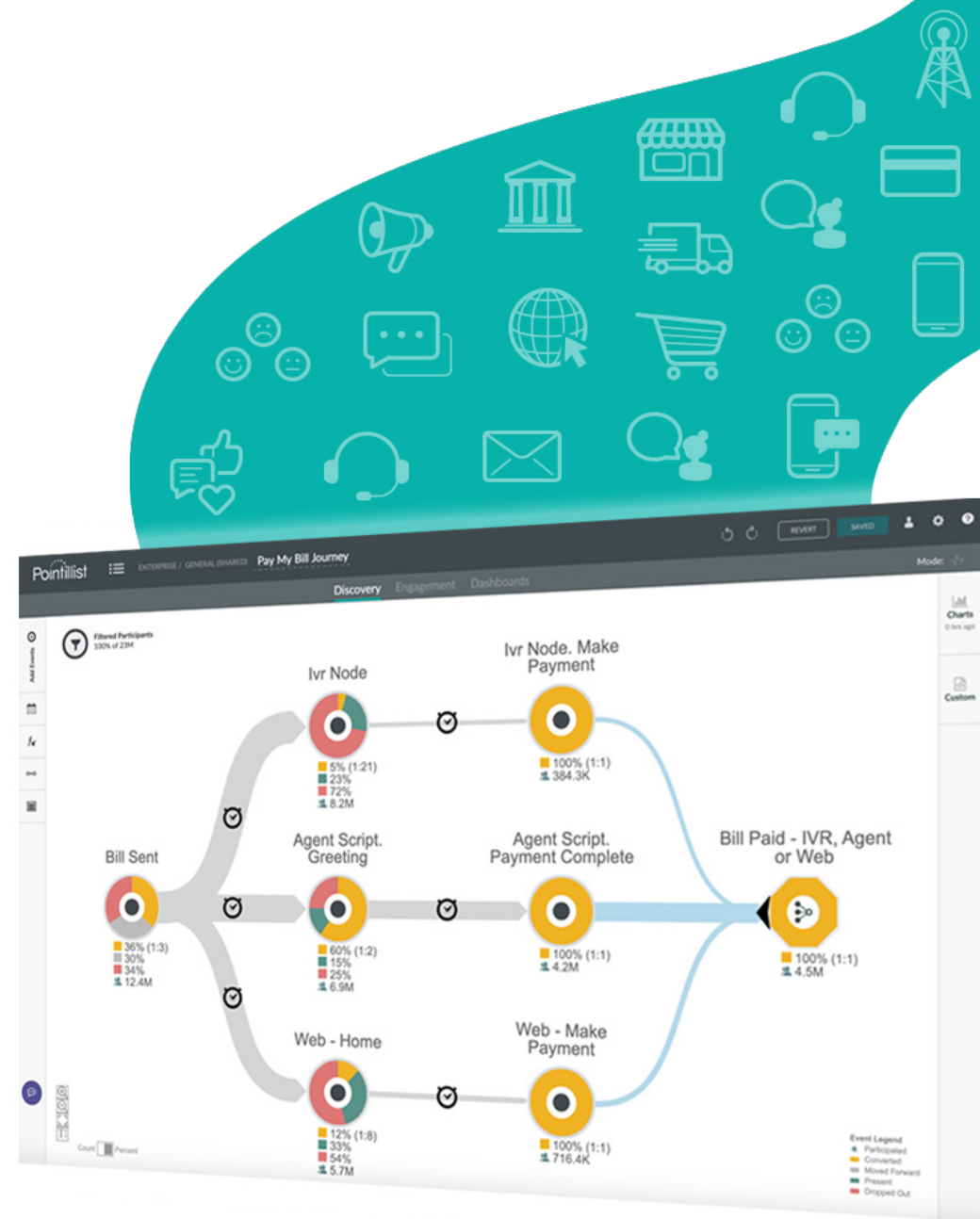
1. Measure and manage Omnichannel KPIs

By monitoring key metrics such as FCR and AHT, contact center leaders can assess the performance of assisted and unassisted channels, and hopefully see changes in real time. But traditionally, metrics are aggregated and measured by channel, which makes it difficult to determine how specific experiences compare, as well as how they impact business outcomes.

When measuring KPIs this way, you can guess how different initiatives might improve certain metrics, but you're likely wasting time and resources on actions might not help much or at all. Journeys take the guesswork out of contact center measurement.

Connecting journeys across self-service and agent-supported channels enables you to monitor omnichannel metrics, better understand why they're changing and prioritize actions to improve those numbers.

Journey-based measurement allows you to drill down and uncover which journeys drive changes to your metrics. These journeys might include applying for a mortgage or adding a dependent to a health insurance plan. This way, you know which customer goals — as well as the touchpoints they leverage to reach those goals — impact contact center outcomes.

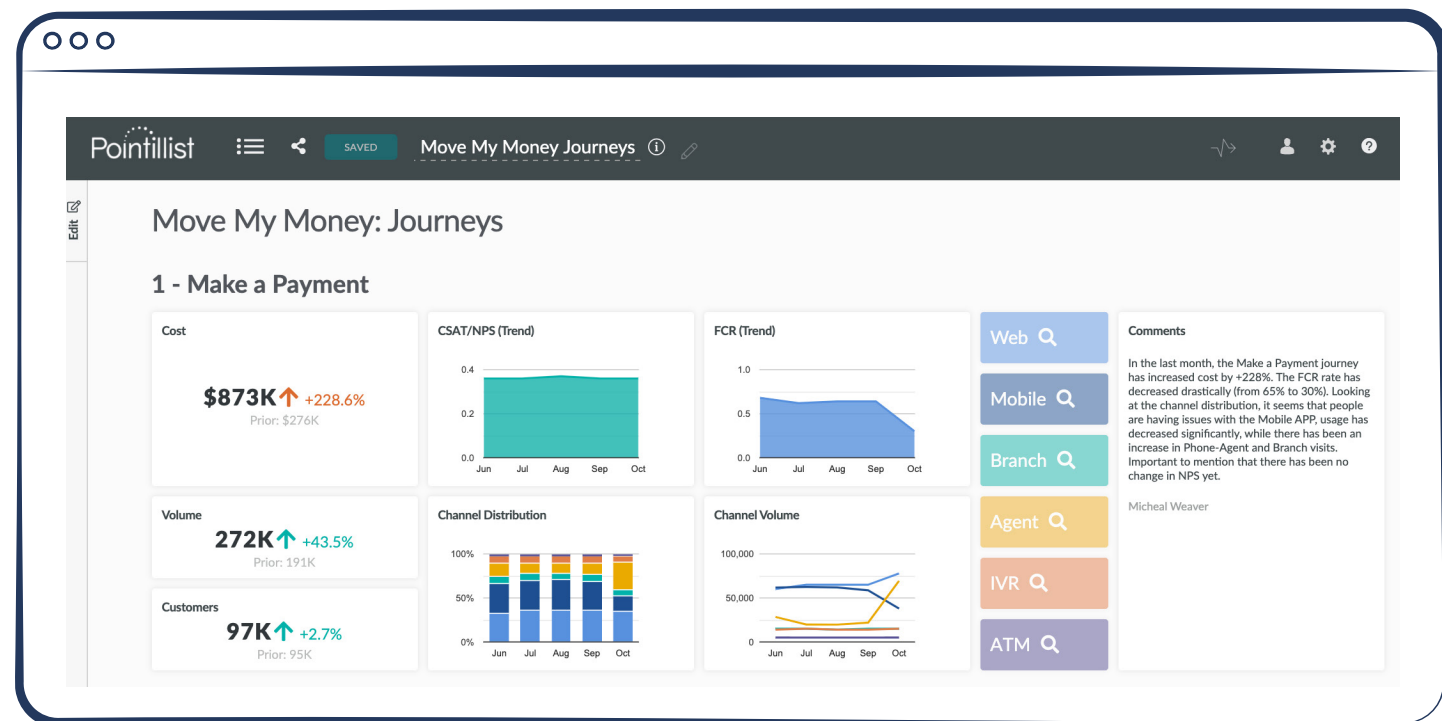


Improve self-service with customer journeys

A major retail bank uses Pointillist to optimize self-service channels and reduce call volume.

The VP of Contact Center Strategy and Analytics at a large retail bank noticed an influx in call volume of almost 44% and a 228% increase in costs. She also saw FCR decreasing dramatically.

She could invest in digital transformation initiatives to optimize self-service channels, but that endeavor would take months — if not years — to achieve. She could also opt for more training to enable agents to resolve contacts on the first call. But before doing either, she analyzes the behavior driving call volume.



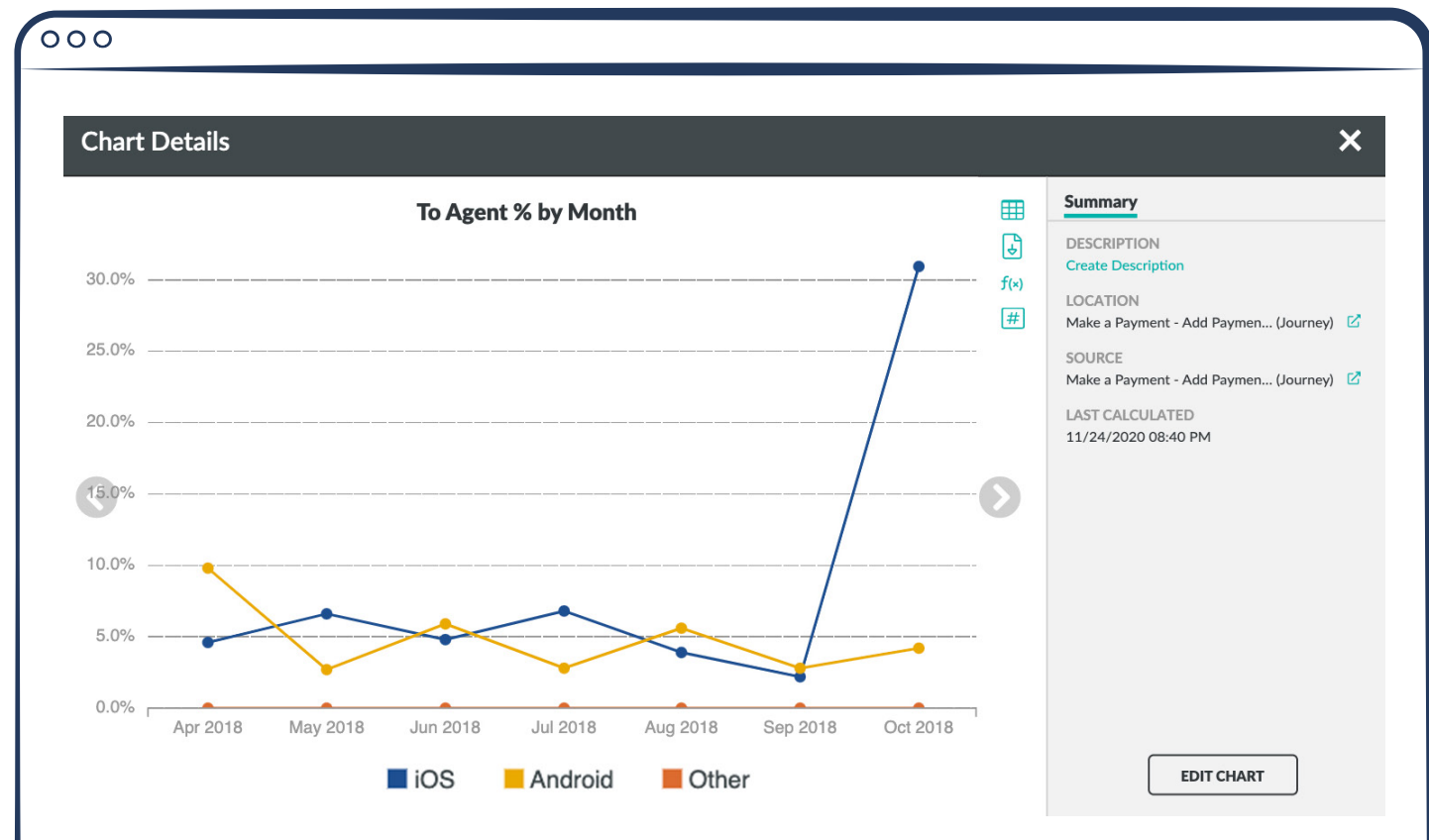
Improve self-service with customer journeys

The VP sees that call volume is spiking after clients use the iOS version of the mobile app. She finds that clients place a call after attempting to add a payee. This indicates these clients are attempting to complete a bill payment.

She shares this information with the mobile app product manager, whose team works to fix the iOS issue. She also alerts the client services team, who activates an audience that will update daily until the app is fixed.

The audience includes customers who've already encountered the problem, as well as customers who have created new payments in the past 30 days are likely to experience this issue soon. They also set up an automated communication to this audience that acknowledges the issue and contains a digital workaround.

As a result, call volume and costs decrease while FCR rises.



2. Identify what's driving customer contacts

One of the most crucial aspects of contact center optimization is determining the drivers of contacts, especially costly ones. This is one of the greatest challenges contact center leaders currently face. It's difficult to know exactly what customers are doing across channels. But it's imperative to understand their behaviors before implementing changes and improvements.

The cause may lie within your contact center because of confusing IVR prompts or AI-powered chat scripts. Or the problem could be beyond your control, such as when a credit cardholder can't view a statement or add a payee via the mobile app. In this instance, data typically is siloed within other business departments like product or billing.

Identifying the root cause of contacts requires understanding more than just the most recent contact center interaction an individual has had. That's why journey-based approaches like customer journey analytics are crucial. It enhances root-cause analysis by analyzing all the steps customers have taken and the channels they've leveraged to accomplish their goal prior to reaching out to the contact center for help.



Identify the root cause of costly contacts

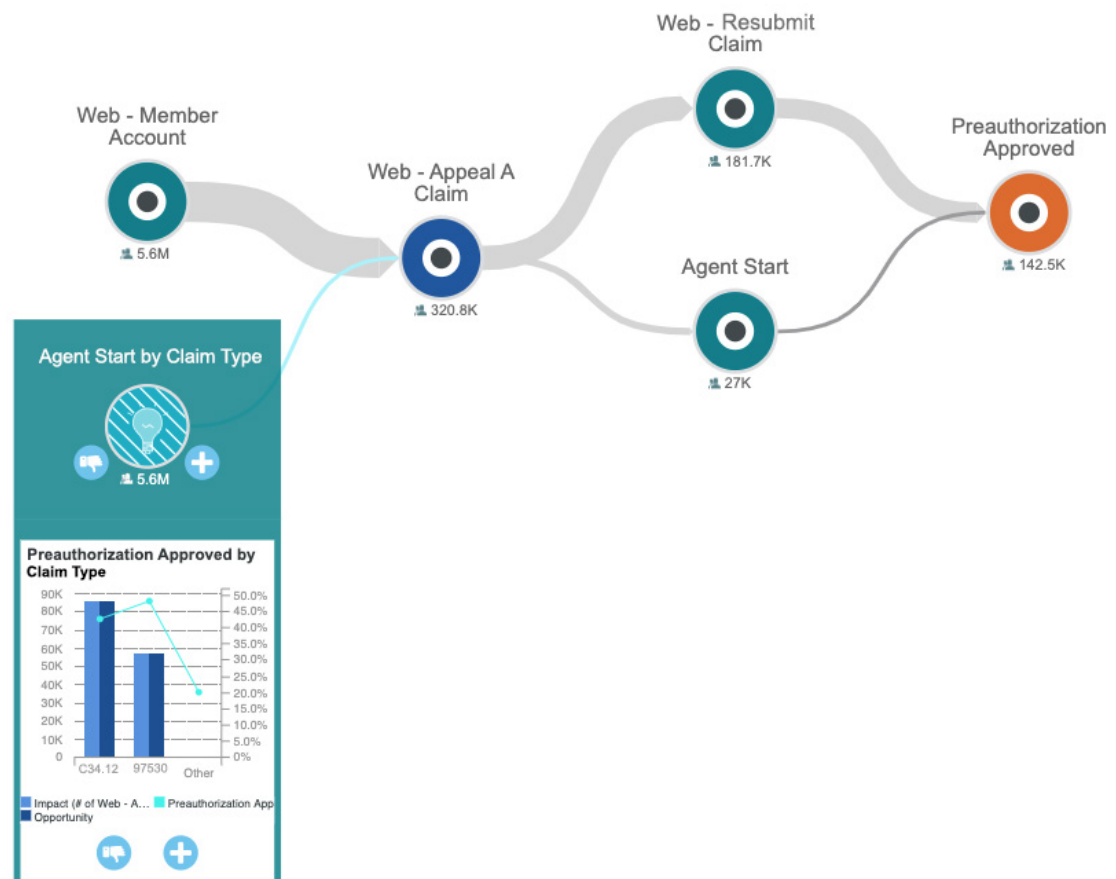
A leading health insurer uses Pointillist to identify causes of increased contact volume and declining satisfaction rates.

The Director of Contact Center Operations at a health insurance provider is alerted about an influx in contacts, as well as a significant decrease in member satisfaction. The director prompts her analytics team to diagnose the problem.

The analysts use Pointillist to uncover the journeys that most frequently result in agent-supported contacts. Diving deeper, they find the influx is coming from members addressing a pre-authorization denial.

Further, they see that most of these contacts are members whose physicians are requesting a specific treatment. It seems the insurer's system is incorrectly coding physical therapy as a surgical procedure.

The director shares this information with the team that owns the prior-authorization workflow so they can optimize the submission process. She also connects with care managers, who reach out to members denied for this treatment to notify them of the issue and provide a temporary workaround.



3. Optimize disposition codes by uncovering why customers contact you

Many contact center leaders leverage dashboards that track high-level metrics like CSAT, recontact rate, digital containment rate and more. But these metrics only illustrate how you're performing — not why.

Integrating NLP tools with journey analytics lets you determine not only what's changing, but more importantly, why it's changing. Pinpointing multiple drivers of contacts based on what your customers actually say to an agent could reveal call reasons that don't fall within the scope of current disposition codes.

Adding information gleaned from journeys, rather than relying on disposition codes manually assigned during the most recent contact center interaction, improves data quality and reduces costs. It also improves call routing and enhances agent efficiency, as contacts can be triaged more effectively with more thorough information.



4. Orchestrate actions to drive self-service rates

Journey orchestration allows you to leverage omnichannel customer behavior to prompt actions that reflect each individual's unique context and help them achieve their goals more easily. By optimizing self-service options, you can minimize human-assisted interactions to reduce costs. This also allows agents to focus on more complex inquiries.

Contact center leaders are adopting journey orchestration to improve digital touchpoints — from automated chatbots to conversational virtual agents — as well as drive next-best-actions. Fueling digital touchpoints with real-time customer journey data allows you to orchestrate actions that are informed by each customer's historical experience and current goals.

For example, if a customer visits your website to diagnose a service disruption, your chatbot can offer the customer instructions on how to check and fix hardware issues that could cause connectivity problems. These types of actions help customers solve their problem quickly and avoid an unnecessary agent interaction.



Journey orchestration optimizes self-service experiences

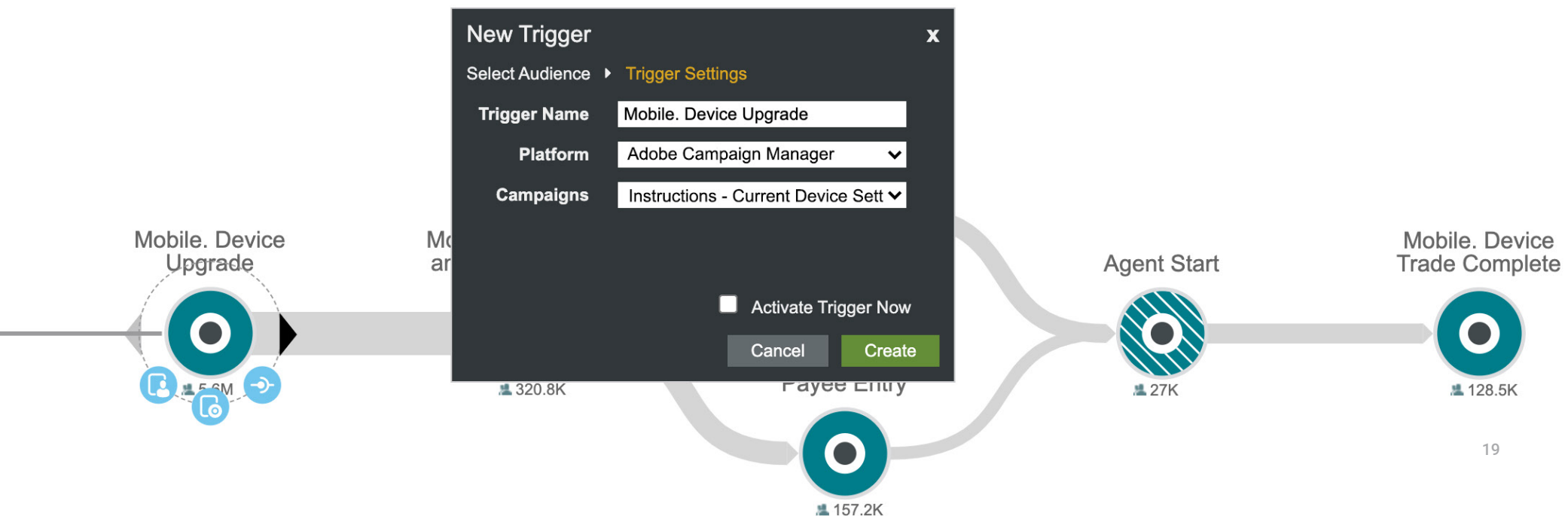
A mobile provider uses Pointillist to improve self-service device activation.

A leading mobile provider analyzed the experiences of customers trading in their current cell phones for new models. The VP of Customer Care sees that many customers began on the website, but end up contacting an agent to complete the process.

Using journey analytics, the company finds that customers call because they don't know how to find their model and serial numbers, which are necessary to make the trade.

The VP shares this information with the digital product team, who deploys new functionality that automatically recognizes a customer's device and populates their model and serial number into the web form.

Next, customer care and marketing create and orchestrate a web pop-up with instructions on how find their model and serial numbers on their own. This pop-up appears when customers click on this field of the web form. This allows customers to complete their trade online without contacting an agent.



5. Streamline case handling and escalation management

When it comes to contact center optimization, managing escalations and complex cases is often front of mind.

Whether a customer is simply unhappy with a product or service, or your agent lacks the training to serve them efficiently, your customer's problem might require escalation. And escalations cost money, require time and expertise, and often jeopardize customer satisfaction.

Escalated contacts are inevitable. But journey-based approaches like customer journey analytics can identify the root cause of escalations and improve how you manage them.

Consistent monitoring of omnichannel journeys enables you to:

- **Determine the severity of a problem:** Measure the impact of queries or problems on metrics like AHT, FCR, recontact rate, CSAT, CES and cost per contact.
- **Understand the breadth of the problem:** Uncover which customers are on similar journeys and could encounter the same problem, regardless of channel.
- **Ensure issues are addressed efficiently and at the right level:** Use journey-driven information to improve call routing and empower agents with information in real time regarding the customer's goal, current problem and how they've attempted to solve it.



6. Improve cross-functional collaboration

Every enterprise wants to improve customer satisfaction. But it typically leads to each business unit purchasing expensive technology that will serve its purposes alone. You end up mired in a complex web of technology with little visibility about how customers are interacting with parts of the organization beyond your department.

Journeys are the key to unlocking and sharing information across your organization.

Analyzing omnichannel journeys shows you exactly how customers engage with other parts of your business and helps you identify which journeys result in contacts. This provides you with useful data you can share with colleagues. Then they can use this information to determine which improvements to prioritize and implement.

Using journeys improves internal collaboration. This can certainly reduce call volume or increase digital containment rates. It also helps your enterprise become more customer-centric, by delivering more consistent experiences across every touchpoint.



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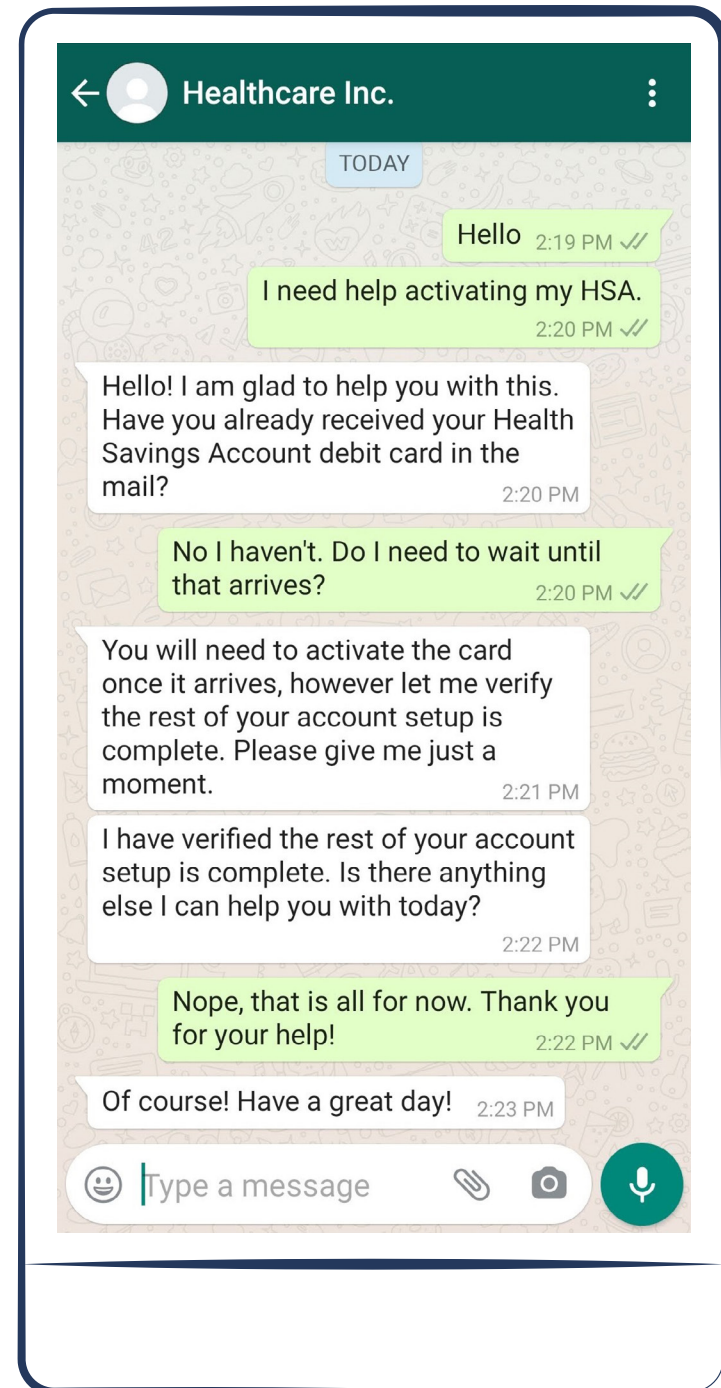
SUMMARY

Summary

Operating a contact center is complex with the proliferation of new digital channels, remote agent work, AI and evolving customer demands. It's no wonder that customer care and service leaders are adopting a new approach to satisfy customer needs and meet business goals like improving efficiency and reducing cost to serve.

Aligning on customer journeys improves your measurement program and your ability to quantify the impact of customer behavior in the contact center to business-critical outcomes. Using journeys, you can identify what customers want to accomplish using self-service channels, as well as how successful they are at achieving those goals.

The benefits of using customer journeys for contact center optimization not only affect metrics and KPIs, but also extend across your business and – most importantly – to your customers.





Contact center leaders are under pressure to increase customer satisfaction, improve performance and lower costs. In a world where customers expect a personalized experience on any channel they choose, contact center teams struggle to deliver experiences that anticipate each customer's needs by recognizing their preferences, prior experiences and current goals.

That's why customer-centric organizations rely on the Pointillist Contact Center Optimization Solution to improve every contact center experience, increase customer and employee satisfaction, boost contact center performance and reduce cost to serve.

Contact center operations depend on Pointillist to:

- Measure & monitor omnichannel experiences both within and beyond the contact center
- Identify the drivers of poor contact center experiences and performance issues
- Deliver frictionless and connected omnichannel contact center experiences by bridging the gaps between chat, voice and IVR

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